TRILOG GROUP, INC.

ProjExec®

ProjExec®

Administrator Guide

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Administrator Guide

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Chapter 1. Guide to Managing ProjExec

Site administrators have exclusive access to administrative features that they can use to manage ProjExec.

Trilog's ProjExec is an extensive and multi modular solution that requires management and administration. Access to the administrative features, is restricted to users having the **Site Administrator** role.

Note

Some features described in this guide are part of specific editions (or platforms) of ProjExec. To specify to which edition they apply, the edition name is added between parenthesis at the beginning of the paragraph.

(ProjExec for IBM Connections) Some administrative settings can also be configured for each ProjExec site. A site is a virtual place where are defined a list of projects. Users belonging to a site cannot view projects of the other sites. A site manager is responsible for configuring his own site.

The Calendar integration option and the configuration of the Calendar integration are available for both, the Site Administrators and the Site Managers. Note that the Site Manager role is available in ProjExec for WebSphere Portal or WebSphere only.

Note for Quickr users

If you are using ProjExec for **Quickr**, a **single** site is used to store all projects and data. The concept of virtual places containing one or more projects is already implemented by the Quickr places. Therefore ProjExec for Quickr does not allow the creation of several sites.

This Administrator Guide describes the various tools and features available only to the site administrator in order to help him manage the application, and some site configuration available to the site manager. These features are easily accessible and their usage is both straight forward and intuitive. ProjExec can have one or many site

administrators, a role which by itself, grants the user ultimate and global authority over the entire application. Note that the list of site administrators is available in Global settings/Administrators.

(ProjExec for IBM Connections) The list of site managers for a site is available on the site form

While this Administrator Guide explains the features visible only to the site administrator, it is complemented by the User Guide, which explains how to use the rest of the ProjExec features.

Chapter 2. Integration with Notes Calendar

Details for site administrators and site managers about Calendar Integration with ProjExec.

Knowing the availability of resources and making optimal assignment of resources to projects is a crucial component of project success. It is equally important for project participants to be aware of their availability and time commitments to manage time, participate in team meetings and complete work and assignments on schedule. ProjExec includes extensive calendar features as an integral part of the core product. Project and task calendars can be defined and are used to calculate schedules and dates for various tasks. Individual user calendars may also be defined for each resource within ProjExec to indicate specific resource availability. My Calendar and Project Calendar views display task and activity schedules for both individual users and collective project teams.

Most personal information management applications and other project management applications treat calendars as functional silos where resources are committed only within the single application domain. Individuals typically use a separate calendaring tool for personal productivity, often an extension of their email application. Most users do not need another separate calendar, but instead can benefit from Calendar integration.

ProjExec addresses the challenges of multiple, separate calendars with an option to integrate all ProjExec calendar features with external Notes/Domino calendaring and scheduling to synchronize and display Notes calendar entries with ProjExec tasks and activities in a single integrated location. Users can access a single location to manage commitments and work.

ProjExec supports integration with external master calendars using a service-oriented architecture. Integration is bi-directional; users can choose to export all projects tasks and activities from ProjExec to the external calendar or display all external calendar entries in a calendar view within ProjExec.

Currently ProjExec offers integration only with Lotus Notes calendars hosted on a Domino server. The ProjExec architecture is extensible and could be

tailored easily and quickly to support integration with other types of external calendars.

Before You Begin

ProjExec requires that IBM Lotus Domino 7.x or greater is installed and is being used as the LDAP directory server for your ProjExec installation. Domino is also required to host the Notes calendaring function for ProjExec users who will access the Calendar integration option.

A specific license key is required to enable the Calendar integration option. If you did not buy this option initially, you must obtain the key and update the license in ProjExec to reflect that your ProjExec installation has support for Calendar integration.

To make the integration work, a database named CalendarBroker.nsf must be installed on the IBM Lotus Domino server. This database hosts the Web Service that will be used to interact with the external IBM Lotus Domino calendar. You can download this database from the ProjExec Calendar Integration Page under Site Settings.

Please follow the instructions listed below in order to install the database and sign it.

1. Shut down the IBM Lotus Domino server on which the database will be installed
2. Extract the database file named CalendarBroker.nsf from the downloaded zip file and copy it to the <Lotus Server Home Directory>\Domino\data folder
3. Run the program <Lotus Server Home Directory>\Domino\nlnotes.exe to edit the ACL (Access Control List) of the database
4. Go to File -> Application -> Open and select the server to which the database file was copied. Then browse to the CalendarBroker.nsf database file and open it
5. Go to File -> Application -> Access Control
6. Click on the button labeled *Add*
7. Click on the person icon to the right of the text box in order to add entries to the Access Control List of the database
8. Select the server to which the database was copied and add it to the list
9. Select the user/group who will manage the database and add him/them to the list
10. Click on the button labeled *OK* to close the *Select Names* popup window and return to the *Access Control List* window

11. Select the server name from the list and set the *User type* attribute to *Server* and the *Access* attribute to *Manager*
12. Select the database manager user/group name from the list and set the *User type* attribute to *Person/Group* and the *Access* attribute to *Manager*
13. Restart the IBM Lotus Domino server
14. Open the Lotus Domino Administrator then from the file menu click on *Open Server* and chose the server you want to connect to (make sure to open the server where your directory resides)
15. Open the *Files* Tab, and from the list of NSF Database, locate the Calendar Broker, right-click on it and chose *Sign* to sign the file.

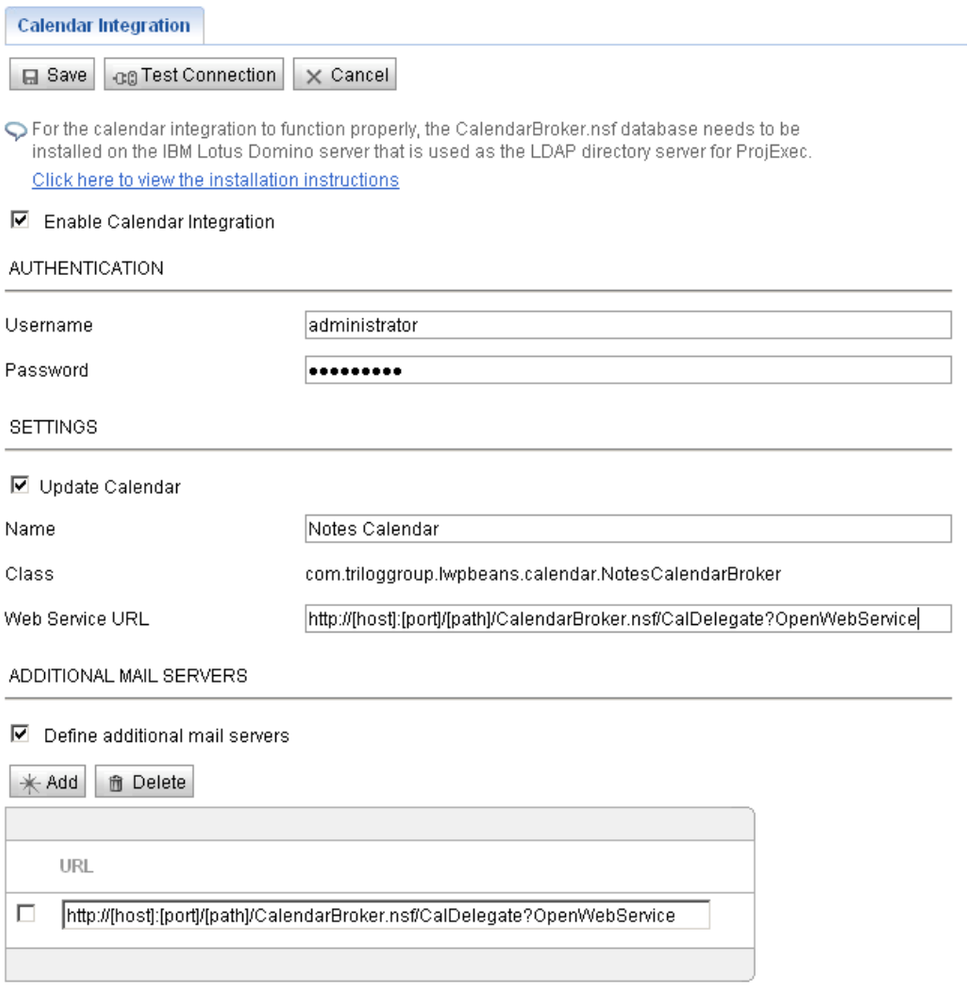
Once the database is installed, you need to grant public access to the web service so that it can be used from within the ProjExec application. To do that, please follow the instructions listed below:

1. Open the CalendarBroker.nsf database with IBM Lotus Designer
2. Go to Code -> Web Service Providers -> CallDelegate (Code is located in the left panel)
3. Double Click on *CallDelegate*
4. When the code window opens, click on the " Properties" tab
5. Select the *Security* tab
6. Check the option labeled *Allow Public Access users to use this web service*
7. Close the *Web Service* properties window and then close IBM Lotus Designer

Access Calendar Integration Setup

Only users having the global function **Calendar Integration Administrator** can access the Calendar integration option and manage the configuration of the Calendar integration. Select Calendar Integration from the **Site Settings** menu.

A form like the one shown here is displayed.



The form opens in edit mode for users who have the permission allowing them to enable/disable the Calendar integration. When you choose to enable the Calendar integration, the fields listed here will appear in the form. Enter the appropriate parameters as described below.

Authentication

Enter the username and password of a Domino Local Domain Administrator.

Update Calendar: You may choose to enable or disable the option to update the user's external calendar. By choosing to enable an external calendar, the user will see the Update Notes Calendar button in the action bar of the My Calendar page. The button will be used to update the logged-in user's external calendar with all the project tasks assigned to him in ProjExec from the current date onward.

Name: Displays the name of the calendar to integrate with.

Web Service URL: Specifies the URL of the Web Service that will be used to interact with the external calendar. This consists of the protocol, host name (example: myserver), port number (do not put anything if you use the default port), path (do not put anything if the database is directly under the root), Lotus Notes database name, and the web service name.

Example:
http://myserver/CalendarBroker.nsf/CallDelegate?OpenWebService

Additional Mail Servers

If the users in your organization are distributed over several mail servers, you may need to specify several mail servers. You have to repeat the process to install the CalendarBroker database on all mail servers.

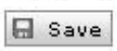
Indicate the Web Service URL for all mail servers.

Test Notes Calendar Connection

When the Enabled box is checked on the Calendar Integration form, the button

is shown in the action bar. Once the appropriate values have been entered as described above, click

to test the parameters entered and to establish the connection with the external calendar.

Once all the desired modifications have been made to the Calendar integration configuration, click 

to close and save the changes.

Chapter 3. Integration with IBM Connections

This chapter contains detailed instructions to activate the connector for IBM Connections.

If you are running ProjExec for IBM Connections, this integration has been automatically set during installation process.

If you are running on Quicker, you can define some settings to integrate with an IBM Connections server to use Profiles and Activity integration.

ProjExec can be integrated with an IBM Connections server. This allows retrieving user Connections profile (picture, VCard) to be displayed on ProjExec pages. This also allows creating a new activity, or to view existing activities and add an activity as a bookmark of a ProjExec data.

If you are running ProjExec for IBM Connections, you also have integration with Community and Files.

Enable Lotus Connections Integration

Edit **projexec_config.properties** file in projexec/WEB-INF directory and set the following properties:

```
# Enable Lotus Connections Connector integration
lc.integration=true

# --- Lotus Connections Connector configuration from server ---
# host name of Lotus Connections accessible from ProjExec server
lc.server.host=
# URL Protocol to use to connect to Lotus Connections from
server (http or https)
lc.server.protocol=
# URL port to use to connect to Lotus Connections from server
lc.server.port=
# URL prefix to append to access Lotus Connections REST services
from server
lc.server.rest.url.prefix=
```

```
# --- Lotus Connections Connector configuration from proxy
(client) ---
# Use special configuration for Lotus Connections from proxy. If
set to false, then the connector will use the same properties as
server ones.
proxy.lc.defined=false
# host name of Lotus Connections accessible from proxy
proxy.lc.server.host=
# URL Protocol to use to connect to Lotus Connections from proxy
(http or https)
proxy.lc.server.protocol=
# URL port to use to connect to Lotus Connections from proxy
proxy.lc.server.port=
# URL prefix to append to access Lotus Connections REST services
from proxy
proxy.lc.server.rest.url.prefix=
```

Here is an example of real values:

```
lc.integration=true
lc.server.host=mylc30server.mycompany.com
lc.server.protocol=http
lc.server.port=80
lc.server.rest.url.prefix=
proxy.lc.defined=false
proxy.lc.server.host=
proxy.lc.server.protocol=
proxy.lc.server.port=
proxy.lc.server.rest.url.prefix=
```

Important Notice: If you are using IBM Connections over HTTPS you have to import the certificate into the Domino JVM. Follow instructions from: http://www-10.lotus.com/ldd/dominowiki.nsf/dx/Add_Site_Certificates_to_the_Lotus_Domino_JVM_cacerts_Keystore

Allowing Email addresses to be displayed

You cannot enable IBM Connection Connector if you configured IBM Connections to prevent email addresses from being displayed. If you hide email addresses, ProjExec will not function properly.

To expose email addresses, execute the following command. For more information please refer to IBM documentation:

http://publib.boulder.ibm.com/infocenter/ltscnnct/v2r0/index.jsp?topic=/com.ibm.connections.25.help/t_admin_common_hide_email_using_script.html

1- Open a command prompt, and then go to the following directory on the WebSphere® Application Server hosting IBM Connections:

C:\IBM\WebSphere\LotusConnections\ConfigEngine

2- Enter the following command to run the script that configures IBM Connections to display e-mail addresses. You must launch the script for each WebSphere Application Server profile on which you installed a feature:

```
ConfigEngine.bat action-expose-email -DprofileName=<profileName>
-Dusername=<username> -Dpassword=<password> >
D:/expose_email.log 2>&1
```

3- Restart the servers.

Chapter 4. Using the Global Settings

Detailed instructions for site administrators to add and edit organizations and sites, add other site administrators, and enable or disable features such as Sametime integration or Skype™ integration.

ProjExec includes a separate **Global Settings** application that is used to manage access to different projects and create virtual groupings of projects under sites and organizations. Hosting multiple sites with multiple projects using ProjExec is simple and intuitive. Instead of installing a separate ProjExec application for each site on a different server, you may set up a hosted application environment, where ProjExec is installed on a central server that supports virtual division of documents by site. This type of environment allows centralized management of ProjExec and increased scalability to add other web applications to the site without disrupting the functionality of the existing system.

This chapter describes the use of the **Global Settings** application. As a user with the role **Site Administrator, you** will have full access to the functionality of this application.

Accessing the Global Settings

The **Global Settings** module is located under the menu **Administration**.

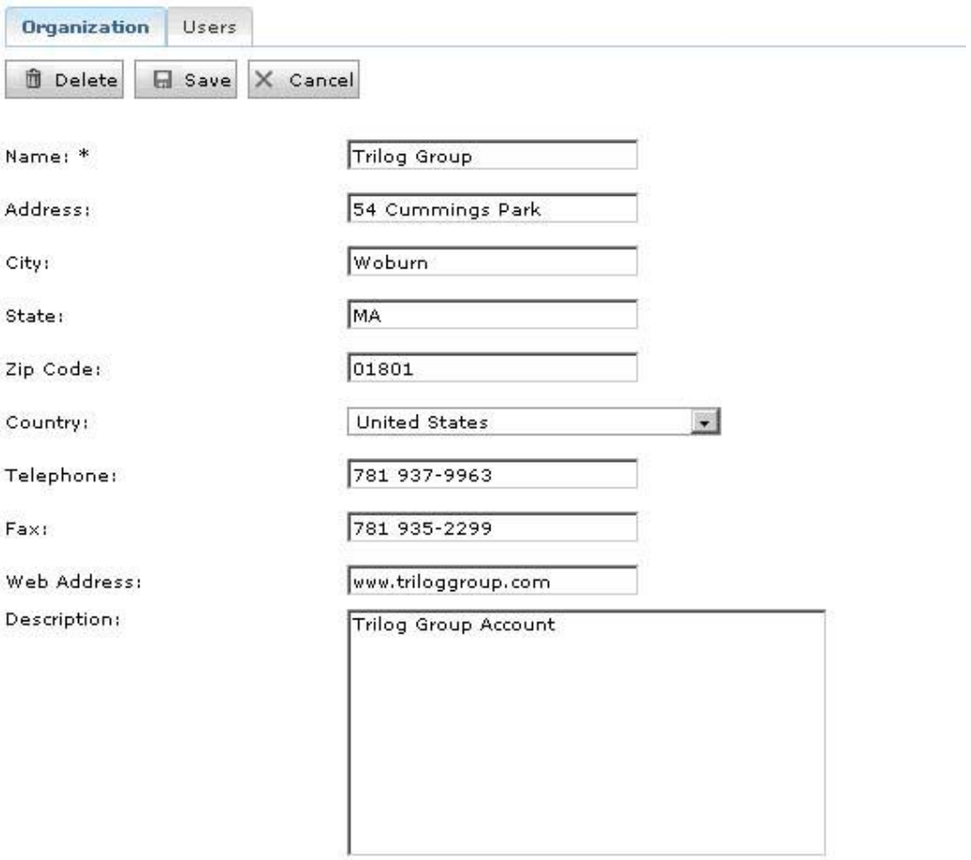
> In ProjExec for Quickr J2EE and ProjExec for Quickr Domino, create a ProjExec Administration Place to be able to access the Global Settings.

Organization Management (ProjExec for IBM Connections)

An organization has users (e.g. employees or resources) distributed in different geographical locations and in different departments. We refer to a group of employees belonging to the same subdivision - whether it is a geographical location or a department - and sharing a set of applications and services as a Site. An organization can have more than one site, but a site is restricted to one organization.

The Organizations view, as shown below, displays all organizations with their addresses. The Organizations view can be sorted by organization name by clicking on the arrows next to the Name column heading. The organization name in the view is a link to the organization's details.

The site administrator has access to a form to add new organizations or to edit organization users once an organization is added. Click from the Organizations view to create a new organization. Click on an organization name to view or edit its details. The Organization Details form is illustrated below.

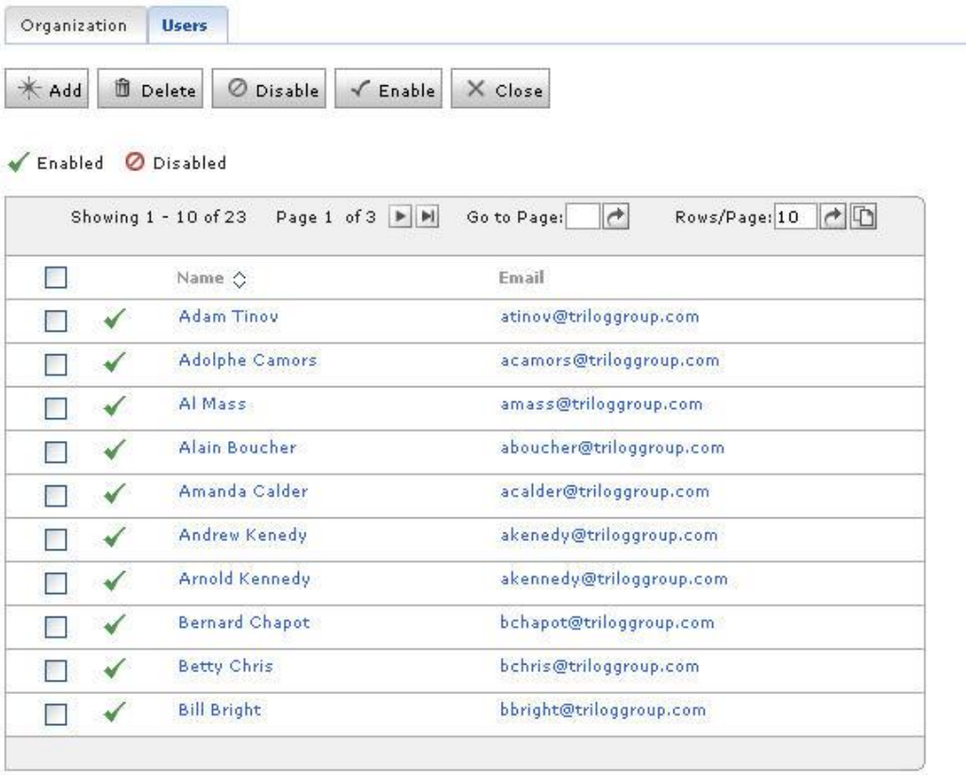


Enter the details concerning the organization as prompted by the fields on the form. The Organization Name field is required.

You can also delete an organization from this form by clicking on the

button. This action will delete all the sites related to that organization, all the documents for those sites including projects, and all the users in that organization.

Click on the Users tab to open the list of users belonging to the organization, as shown below.



You can add new users to the organization by clicking on the Add button and selecting the users from the application directory.

You can delete users from the organization by checking their corresponding checkboxes and clicking on the Delete button.

You can also enable users in an organization by checking their corresponding checkboxes and clicking on the Enable button. Note that the selected users will not be automatically enabled on sites of which they are members.

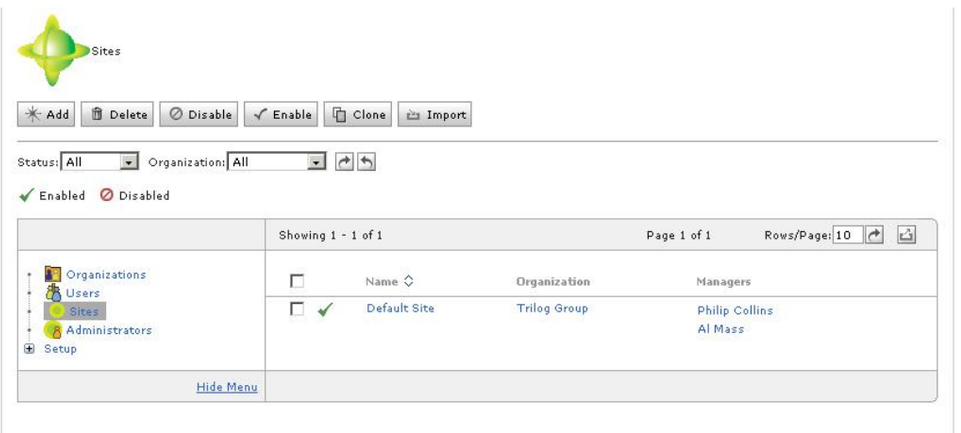
Moreover, you can disable users in an organization by checking their corresponding checkboxes and clicking on the Disable button. Note that the selected users will be automatically disabled on sites of which they are members.

Click on a row value for a desired user and you will be redirected to his/her profile.

Site Management (ProjExec for IBM Connections)

A site is a virtual representation of a group of users sharing the same applications and services.

In the **Global Settings** application, the sites appear listed in a view accessible from the Sites menu. The Sites view is illustrated below.

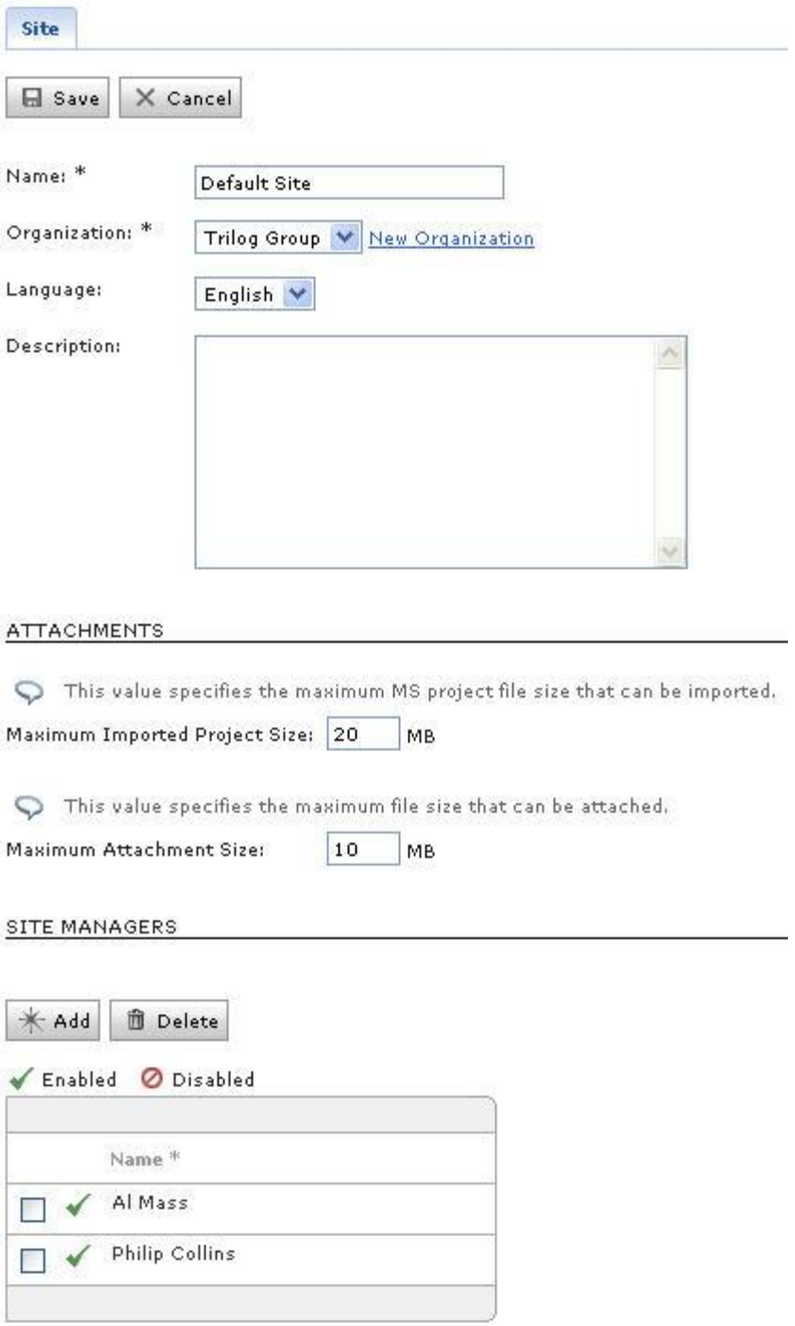


Each site is linked to only one organization, although an organization can have more than one site.

A site has users and applications. The site administrator can create, clone, edit and delete sites. In fact, he has access to all functions in all sites and all applications.

The site administrator has access to the

button which opens the site form to create a new site as shown below.



A new feature of ProjExec is the possibility to create new organizations while creating a site by clicking on the New Organization link.

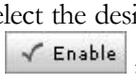
The same form is used to edit existing sites. For more information on editing sites, you can refer to Chapter 8, *Using the Global Settings*, in the ProjExec User Guide.

The site administrator has access to the Sites view that lists all available sites. The view displays the site status, name, organization, and managers. As a site administrator, you may also enable, disable, clone, import or delete sites using buttons on this view.

You can choose to delete sites. After it is acknowledged that a site is being deleted, all site related documents in all databases will be removed including projects. To delete one or more sites, select the desired site(s) by clicking on the checkbox next to the site name. Click

and approve the confirmation message to remove the selected sites.

Like organizations, sites can also be disabled or enabled. A disabled site is no longer accessible in any of the applications it implements. To disable one or more sites, select the desired site(s) by clicking on the checkbox next to the site name. Click

and approve the confirmation message to disable. To enable one or more sites, select the desired site(s) by clicking on the checkbox next to the site name. Click 

and approve the confirmation message to enable the selected sites. Notice that already enabled sites are not affected.

You can also clone the site, thereby creating a new site with the same attributes, managers, applications and users but with a different name and id. To clone one or more sites, select the desired site(s) by clicking on the checkbox next to the site name. Click

and approve the confirmation message to clone the selected sites. For each selected site, a new site is created with the same name as the original site plus the word "clone" appended to it. Note that cloning a site, does not clone the projects created under that site nor their clients.

Finally, you can import a site that has been previously exported as a zip file. To import a site, click

and follow the step by step directions of the Import Site Wizard. If the site doesn't already exist, it will be created. However, if it already exists you will be prompted on whether or not you wish to replace the existing site.

The Import Site Wizard consists of the following tabs:

1. **Import Site:** Click Browse..., to navigate to the location of the zip file and then click Upload to attach the selected file. Upon a successful upload, a message will appear that the file was successfully uploaded. If the wrong file is selected, click on Reattach File and repeat the Browse and Upload steps to upload the correct file.

   If the uploaded site already exists, a message will appear prompting you on whether or not you wish to replace the existing site. Furthermore, if the organization of the imported site does not exist, a message will appear informing you that the organization to which the imported site belongs no longer exists and that you can either select an existing organization from the drop down list or create a new one.

   To create a new organization, click on the New Organization link, specify the name in the Name field and then click .

2. **Import Resources:** If the site you are importing includes users non existent in the current directory, a page will appear listing the unregistered users, along with a message prompting you to specify a valid email for each user. If none is specified, the user will be denied access to the site. Note that if any of the site managers of the site you are importing are unregistered, you will be required to provide them with a valid email.

   To specify an email, you can either type it directly or you can click on the icon to select a registered user's email. Note that you cannot assign to an unregistered user, the email of a registered user already a member of the site being imported, nor can you enter an email not listed in the directory, as it will not be considered valid.

3. **Move Dates:** Under this tab, you have the option of moving the dates of any project on the site by providing a new start date. This will be reflected on the project schedule and all associated project documents.

   All the projects existing in the site will be listed along with their current Start Date and End Date. In the New Start Date field enter the new start date directly or click on the calendar icon to choose a new start date using the pop-up calendar date picker.

   Note that the New Start Date can be either before or after the current start date and that the start date of the project will in fact be moved to the closest date matching the week day of the current start date within the week of the New Start Date.

Administrator Management

Click on Administrators from the left hand menu to display a list of users with the role **Site Administrator**. The view displays the name and Email of current site administrators as shown below.

Click on the Add button to open the Add Administrators form, which allows you to add new site administrators. Click Select Users and select the appropriate users from the People Finder directory. To remove a user as a site administrator, select their name by clicking on the box in the first column and then click Delete. Note that the application must have at least one site administrator, and therefore you will not be allowed to remove the last user remaining in the list. Furthermore, you will not be permitted to remove yourself as a site administrator.

Sametime Integration

ProjExec provides optional integration with IBM Lotus Sametime to add additional functions such as presence awareness and instant messaging to ProjExec. When Sametime is enabled with ProjExec, users can detect which team members are currently logged in to ProjExec (their name will be preceded by the person icon) and it is a simple matter to click on the icon to initiate a chat, send announcements and files, share screens and use web conferencing capabilities.

Important Notice

All users Distinguish Names (DN) stored in ProjExec database are converted into lowercase. In order to make integration with Sametime work properly, Sametime server must be configured to be case insensitive.

To configure Sametime to be case insensitive, do the following:

Update sametime.ini

1. Open Sametime.ini from all chat servers in a text editor (located in C:\Lotus\Domino\ in our test environment).

2. In the [Config] section add the flag: AWARENESS_CASE_SENSITIVE=0

If Sametime is running on Windows:

3. In the [STLINKS] section append -DAWARENESS_CASE_SENSITIVE=0 to the STLINKS_VM_ARGS as follows:

STLINKS_VM_ARGS=-Xmx128m -Xgcpolicy:optavgpause -DAWARENESS_CASE_SENSITIVE=0

Update stlinks.js

1. Open stlinks.js in all chat servers in a text editor (located in C:\Lotus\Domino\data\domino\html\sametime\stlinks in our test environment).

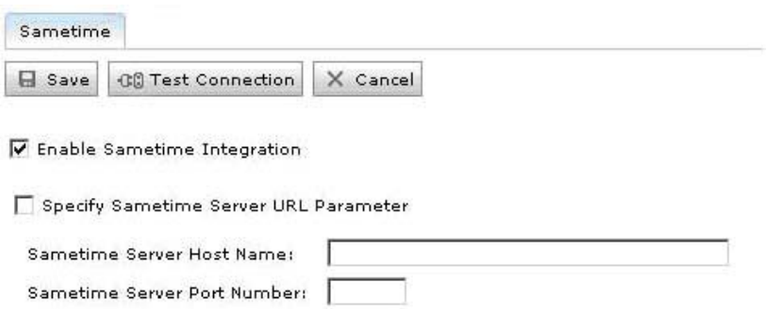
2. In the variable section set the variable STlinksCaseSensitive to false:
var STlinksCaseSensitive=false;

3. Restart Sametime.

Here is an IBM documentation to configure Sametime to be case insensitive:
http://www-01.ibm.com/support/docview.wss?uid=swg21174297

Only users with the role **Site Administrator** can enable and configure this option. You must be using the Domino Directory server as the LDAP directory for ProjExec in order to enable the Sametime option. If you are not using Domino, a message will appear stating that Sametime integration is supported only for Domino Directory Servers, when you attempt to enable the option using the instructions below.

From the **Global Settings** menu, expand Setup, as shown above, and select the Sametime sub-menu item. The Sametime Integration form will open in edit mode automatically allowing you to enable/disable Sametime integration as shown below.



In the Sametime Integration page, specify the requested parameters for your Sametime server. Enter either the server URL or the Host name and port number of the Sametime server.

When Enable Sametime Integration is selected, the button

is shown in the action bar. Click on this button to test the parameters entered and establish a connection to the Sametime Server.

After verifying the correct Sametime integration configuration, click

to close and save the changes. Users will now have access to all Sametime functions within ProjExec.

In certain cases, you will have to do the following configuration: For the Sametime integration to function properly with Firefox, you need to create a new folder called "sametime" under the location lwpbeans\person and then copy the corresponding "stlinks" folder from the IBM Lotus Sametime server to the deployed ProjExec application folder, under the location lwpbeans\person\sametime. After that, replace the stlinks.jar file under lwpbeans\person\sametime\stlinks by the stlinks.jar file found under lwpbeans\person\sametime\stlinks\signed. The ProjExec application does not include this required library.

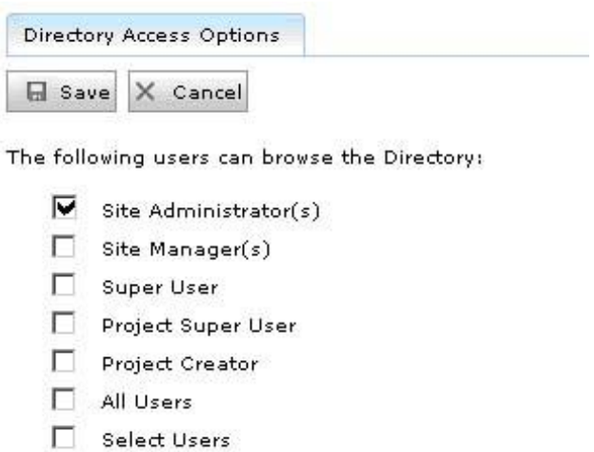
Skype™ Integration

For detailed information about the ProjExec integration with Skype™, please refer to the Skype™ Integration User Guide.

Directory Access Options

You may set the level of access to the directory by choosing the role(s) or users(s) that would be granted the directory browsing privilege.

Click on the Directory Access sub-menu item under **Global Settings** to open the Directory Access Options form.



The form opens in edit mode automatically allowing you to change the directory access options by explicitly specifying whether Site Manager(s), Project Manager(s), the global Super User, Project Super User, Project Creator, or All Users are granted that privilege. Directory browsing access can be toggled on and off by simply clicking on the checkbox next to each of the options.

The ProjExec administrator is granted the directory browsing access right by default, and it is irrevocable.

Moreover, the directory browsing access may be granted to specific users by clicking on the checkbox next to the option labeled Select Users. This gives you the option to select those specific users from the directory by clicking on the icon.

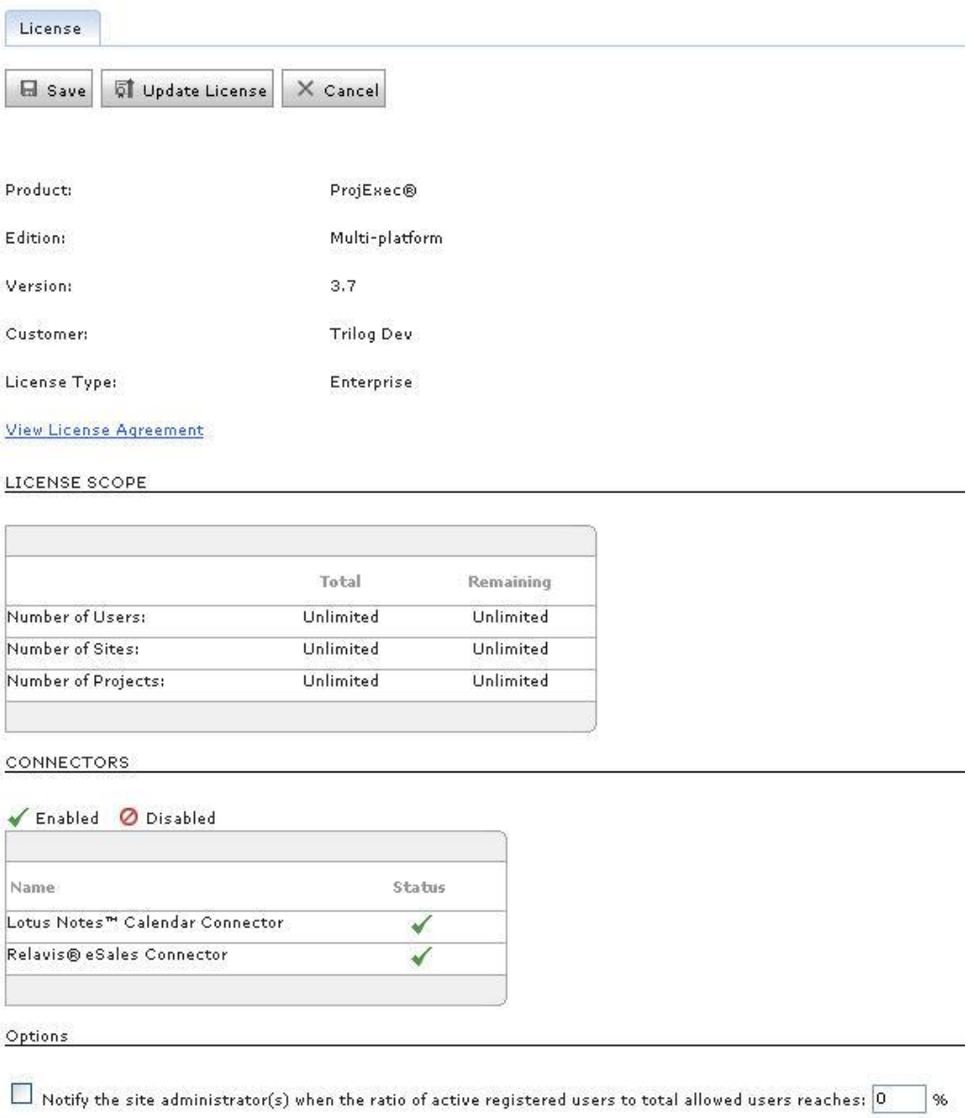
Once you have finished setting the directory access options, click on the Save button to save your changes or on the Cancel button to cancel your changes.

If a Site Manager is granted the directory browsing access right, he/she would be able to add users from the directory to the sites managed by him/her. Otherwise, he/she would not be able to add users to sites managed by him/her.

Similarly, if a Project Creator is granted the directory browsing access right, he/she would be able to add users from the directory to the projects managed by him/her.

License Manager

Click on the License sub-menu item under **Global Settings** to open the License Manager form. The form opens in edit mode automatically.



The license page displays the details encoded in the license key provided at the time of installation or last license update. It also enables you to view the license agreement as well as update the currently installed license.

There are four different license types: trial, standard, enterprise, and hosting. A trial license is always included with the software package in case you have not purchased a standard or enterprise license. The trial license allows the usage of the application for a period of 90 days starting from the installation date, with the maximum number of users being 20.

The product information, license scope, connectors' status, and options are displayed based on the provided license key. If no license key is provided at all, this page will display the details of the trial license. More explicitly, the following fields and properties are displayed:

Product: Displays the product name which is ProjExec.

Edition: Displays the edition of the installed product. The possible values are Multi-platform, ProjExec Portal Edition, or ProjExec Standard Edition.

Version: Displays the version number of the installed product.

License Type: Displays the type of the installed license. The possible values are Trial, Standard, Enterprise, or Hosting. Note that only Hosting and Enterprise application licenses support adding site licenses, such that it is mandatory when the license is hosted and optional when it is enterprise.

Valid Until: Displays the expiry date of the license installed. This field is visible only if the license type is Trial.

License Scope: Displays a table containing the total allowed number of users, sites, and projects versus the remaining number of users, sites, and projects respectively. You can easily tell from this table how many users, sites, and projects are currently added and how many more you will be able to add in the future. Note that unregistered users or disabled users are not included in the users count for license scope validation. Moreover, the disabled sites are not included in the sites count for license scope validation. If you chose to install the sample data and sample users, then the number of sample projects, sample users, and sample sites is not considered in the corresponding count for license scope validation.

Connectors: Displays the available connectors to third party applications along with their status (enabled or disabled). IBM Lotus Notes Calendar is the third party application for which connectors are available.

Options: This section allows you to enable or disable some options at the level of the license scope. The one and only available option in this release is the enabling or disabling of the Site Administrator email notification, when the number of active registered users exceeds a certain percentage of the total allowed number of users. The percentage value is definable by the Site Administrator. Note that if this option is disabled, it will not show unless the page is in edit mode.

You can view the license agreement by clicking on the link labeled View License Agreement prior to the license scope section.

Click on the

button to launch a wizard, in a pop-up window, that will guide you through the process of updating the ProjExec license.

The first step of the wizard displays the license agreement. At this point, you can't proceed in the process unless you accept the terms of the license agreement.

The second step of the wizard consists of entering the new license key. If the key is valid, the third step would display a summary of the license information encoded in the provided key. Otherwise, an invalidity error message is displayed, in which case you have the option of correcting the entered key or entering a new one. Note that in case you are downgrading from a Hosting or Enterprise license to a Standard license, the downgrade will not be allowed if any site has its own license. This is attributed to the fact that only Hosting and Enterprise application licenses support adding site licenses.

The last step of the wizard informs you of the successful update of the license or displays a description of the problem that prohibited the license from being updated successfully. Note that upgrading from any type of license to a Hosting license requires that you specify site licenses for all existing sites or you will no longer be able to access these sites.

Chapter 5. ProjExec Access from Mobile devices

ProjExec supports popular mobile devices (BlackBerry, iPhone, Nokia with Symbian, Android, Windows Mobile) End users can use the browser that is included on their mobile device to access their own project tasks across projects so that they can report progress, view documents and post comments. Users with project manager, portfolio manager and super user privileges will additionally have access to portfolio progress and project alerts.

Configure a user friendly URL for mobile devices

To roll out mobile access to end users, we recommend to configure a user friendly ProjExec mobile URL prior to communicating it to end users:

1. Know the default ProjExec mobile URL:
   - If ProjExec is running on Quickr Domino the default ProjExec mobile URL is : **http://<hostname>/xsp/projexec/mobile/** . Note: the ending slash is important.

   - If ProjExec is running on IBM Connections the default ProjExec mobile URL is :
     http://<hostname>/<application_name>/mobile

   - If ProjExec is running on Quickr J2EE or Websphere Portal the default URL depends on the internal J2EE application name that WebSphere Portal assigns to the ProjExec application when deployed. You can easily retrieve this URL by performing the following steps:
     - Login to the ProjExec Administration Place (or any other ProjExec place) and download the Notes Sidebar Widget as an XML file by clicking on the link called "ProjExec Lotus Notes Sidebar Widget" that can be found at the bottom of any ProjExec page.
     - Open the saved XML file with a text editor and copy the URL located in the tag <paletteItem> in the attribute "url" (Note: copy the "url" not the "ImageUrl"). This URL is generally in the form http://<hostname>/lotus/PA_xxxxx/mobile. This URL is not very user friendly and we highly recommend to create a more user friendly URL that redirects to the default URL.

2. Use one of the following methods to create a simple redirection to the default mobile URL. The goal is to create a short, easy to remember URL for mobile users.
    - HTTP Redirect: Create a redirect rule in your HTTP server. For example redirect **http://<hostname>/pe** to **http://<hostname>/xsp/projexec/mobile**.
    - Reverse Proxy rule: Create a mapping rule and disable checking for normalized URLs for that rule.
    - HTML page redirect: Create an html page called myprojects.html for example and put it on the root folder of your HTTP server. Use the Meta Refresh tag to automatically redirect to the ProjExec mobile URL.

      The following is an example of the html file used for redirection:

      ```
      <html>
      <head>
      <meta http-equiv="refresh"
      content="0;url=http://<hostname>/<projexec_url>"
      />
      <title>ProjExec Mobile</title>
      </head>
      <body></body>
      </html>
      ```

Publish the URL

To inform the end-users of the ProjExec mobile URL, you can publish it in the footer of all ProjExec pages by setting it in a server configuration file. To do that, open the file **projexec_config.properties** located in the WEB-INF directory under the deployed application, un-comment the property **projexec.mobileurl** and append the URL.

Example:
# This option allows you to indicate the URL to access ProjExec from mobile devices.
# If this property is set, the mobile URL will be displayed in the footer of ProjExec pages.
projexec.mobileurl=http://myserver.triloggroup.com/light_projexec

You can also publish/share the mobile URL by mail via intranet or any other internal communication.

Allow to specify login attribute for authentication

It is possible to indicate which LDAP attribute is used by ProjExec users when they authenticate on their mobile devices or on the widget.
For example, if you are using Active Directory, you may want to allow users to authenticate by using sAMAccountName LDAP attribute.

To do that, open the file **projexec_config.properties** located in the WEB-INF directory under the deployed application, and add the property **authentication.filter** to indicate an LDAP query.
For example:

```
authentication.filter=(|(sAMAccountName={0})(cn={0}))
```

This example allows login on sAMAccountName or cn.
Note that it is always possible to log in using cn, uid, email and dn.

Chapter 6. Performance Tuning

This chapter describes some common configurations that may improve the performances in certain cases.

Note

If you encounter performance problems, please first make sure that you followed **all configurations recommended in "Before you begin" section of the Installation Guide** (JVM Maximum heap size, HTTP threads, compression, etc.)

ProjExec on Quickr Domino: use a separate 64-bit Domino server

To build a scalable environment, you need to have two Servers:

- server1: Domino 64-bit
- server2: with Domino 32-bit and Quickr Domino

Refer to the corresponding appendix of ProjExec for Quickr Domino Installation Guide.

ProjExec Resource File Cache on Lotus Domino server

Domino Web Server does not manage cache for ProjExec HTTP files and images. ProjExec manages its own cache for all common resource files: JavaScript files, images, etc.

If there isn't any property specified in the configuration file, the cache time is set to 10 minutes. This means that the resource files are cached on the client machine and used within 10 minutes. After that time when this resource file is needed for a page, a request is sent to the server to check if a new version should be retrieved.

To reduce the number of HTTP connections, you can increase the caching time in a server configuration file.

The server configuration file is located in the deployed application, in the WEB-INF directory: **servlet_config.properties.**

The property that needs to be specified is **fb.domino.http.resource.cacheTime**. The cache duration is specified in seconds.

Example:

```
# Http Resource cache time for FlowBuilder Domino adapter (time
is in seconds)
fb.domino.http.resource.cacheTime=43200
```

The server must be restarted after a property change.

Customize the Wall refresh rate

If a user opens ProjExec home page and leave it opened without doing anything, he can see automatically if there are new entries (messages or events) and click on "Show new entries" to display them.

By default, every 15 minutes - even if the user is inactive - the number of new entries (messages or events posted on the wall since the last refresh of the page) is updated on the Home page.

You can change this refresh rate in a server configuration file located in the deployed application, in the WEB-INF directory: **projexec_config.properties** The property that needs to be specified is **projexec.wallrefreshrate**.

```
#this option sets the wall refresh rate in milliseconds
#default value is 900000 milliseconds
projexec.wallrefreshrate=500000
```

The server must be restarted after a property change.

Customize queries to LDAP Directory

ProjExec performs some queries to your LDAP Directory. You may need to optimize performances for these queries in two cases: if your directory has a lot of attributes for each entry, or if there are a lot of entries in your directory and you would like to restrict to a specific group of users.

To do this optimization, you have to modify the server configuration file that is located in the deployed application, in the WEB-INF directory: **global_config.properties**

1. **Restrict the returned Attribute List**

By default, LDAP queries performed by ProjExec return all attributes that exist in your directory for all returned entries.

To restrict this list in order to increase performances for LDAP queries, you must specify the property **fb.ldap.restrictAttributes**. You just need to uncomment the row that corresponds to your directory.

Example: if you are using Microsoft Active Directory

```
fb.ldap.restrictAttributes=cn;givenname;sn;mail;streetAddress;l;st;postalCode;co;telephoneNumber;mobile;facsimileTelephoneNumber
```

2. **Restrict queries with an LDAP filter**

To restrict to a specific group of users, you must indicate a LDAP filter (by specifying the property **fb.ldap.additionalFilter**) that will be applied automatically to all LDAP queries performed by ProjExec. Of course you must ensure that your filter is correct by testing it with an LDAP browser before.

Example: if you are using Microsoft Active Directory and you want to restrict to users with an email address.

```
fb.ldap.additionalFilter=(&(objectclass=person) (mail=*))
```

Example: if you are using Microsoft Active Directory and you want to restrict to users with an email address and who are members of MyTestGroup.

```
fb.ldap.additionalFilter=(&(objectClass=person)(mail=*)
(memberOf=CN=MyTestGroup,CN=Users,DC=trilog,DC=com))
```

Do not share the Document Pool in case of Cluster "Session affinity" mode

If you are running a Cluster server, we recommend using the mode "Session affinity": the server redirects a user always to the same node during an HTTP session. This mode is the default for most application server clusters.

In this case, the document pool folder does not need to be a folder shared by all cluster nodes.

You can modify the property **property fb.xsp.documentpool.directory** in the file **servlet_config.properties** that is located in the deployed application, in the WEB-INF directory:

You can indicate a local folder for each node.

Chapter 7. Advanced configuration & Troubleshooting

This chapter describes the most common configuration issues, and how to solve them.

If you encounter an unknown problem, please contact ProjExec Support at support@triloggroup.com

ProjExec Support may ask you to send the log files. If you are running on a Quickr Domino server, the ProjExec log files are saved under [Domino Data]\ProjExec Directory.

Example: C:\Program Files\IBM\Domino\Data\ProjExec\projexec.log

If you are running on another platform, the logs are written in the server log files (ex: SystemErr.log, SystemOut.log).

Disable Email notifications due to Wall messages

If you do not want email notifications to be sent each time a message is posted on the wall, you can set a property in a server configuration file.

The server configuration file is located in the deployed application, in the WEB-INF directory: **projexec_config.properties**
The property that needs to be specified is **projexec.wallnotification.disabled**.
You must add the following line:
`projexec.wallnotification.disabled=true`

The server must be restarted after a property change.

Restrict Project Creation feature on IBM Connections

By default **all users** are allowed to create new projects on IBM Connections. If you do not want to let anyone create new projects, you must change a property on the server and then, a user will be allowed to create a new project **only** if he has the **global function "Project Creator"**.

The server configuration file is located in the deployed application, in the WEB-INF directory: **projexec_config.properties**

The property that needs to be specified is **projexec. restrictprojectcreation**.
You must uncomment the line and set the property to **true**:

```
projexec.restrictprojectcreation=true
```

The server must be restarted after a property change.

PDF Reporting configuration for non-Latin languages

Some .ttf font files are needed to create PDF reports for supported non-Latin languages such as Chinese. You might need to tell ProjExec where to find these font files. To do that, you have to edit the "**reporting_config.properties**" file found under ProjExec/…./WEB-INF and add the following: pdf.fonts.folder=<path>.

Example: pdf.fonts.folder=C:/PEFonts

Under the font's folder, you must include the .ttf font files to be used. You have also to create the following file under the font's folder: "pd4fonts.properties",

Once created, edit the file and specify the font file used by adding the following: Arial=<font file name>.

Example of the content for the file "pd4fonts.properties":

```
Arial=unifont-5.1.20080907.ttf
#Arial\ Bold=
#Arial\ Italic=
#Arial\ Bold\ Italic=
```

Note that the reporting feature only supports Arial font.

Directory Tool

This tool allows you to update ProjExec data when the directory is modified. It is useful for example if you want to migrate from one directory to another, or if some user details have changed (name change, email change…).

Important notice : Before using this tool, you must back up your database. Don't hesitate to contact ProjExec support for help to use this tool.

This tool is a command-line tool. Go to the following path:

[ProjExec Install Path]\projexec\projexec\tools

And run this command:

ExecuteTool -java com.triloggroup.pe.tools.DirectoryTool

Available options are:

-console: log to console
-logfile: log to file. File path must be specified next
-update: perform updates. If not specified, the database is unchanged, modifications to apply are logged.
-migrateDns: This option will use emails as reference. Use this option after a directory migration (DNs changed).
-migrateEmails: This option will use dns as reference. Use this option to update CNs and emails for the users.
-logxml: Log all unknown users to an XML file. File path must be specified next.
-loadxml: Launch commands that are contained in the specified XML file. File path must be specified next. You should first use –logxml to get an XML file with the correct format. This can be used to replace specific DNs.

Max File upload configuration for Lotus Domino server

Administrators can set the allowed attachment file size to a max limit or remove any limit; three settings need to be adjusted:

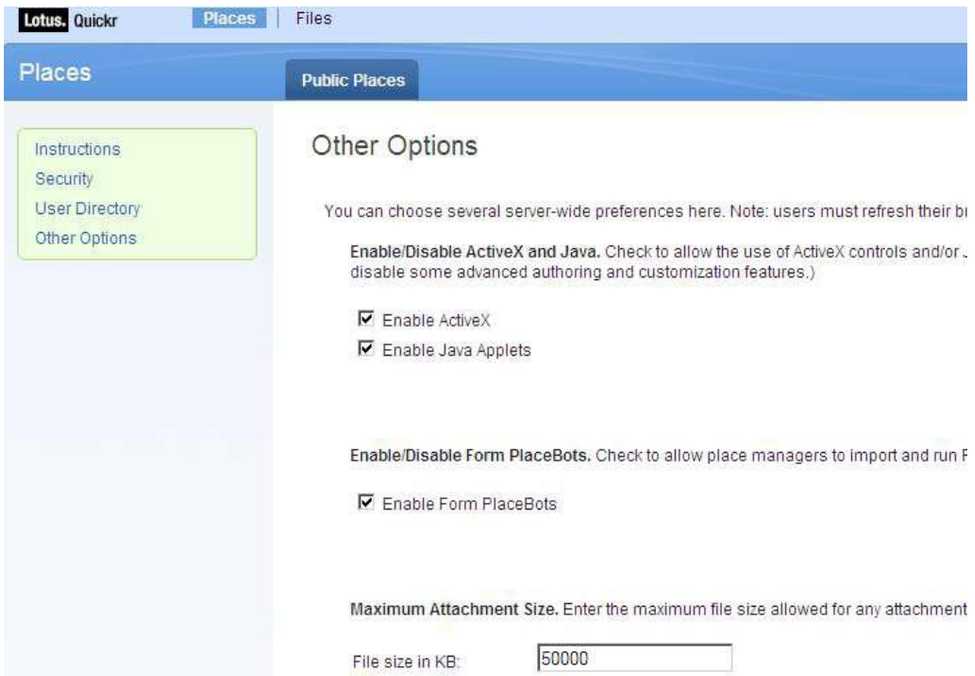
1. Maximum Attachment Size.
2. Maximum size of request content.
3. Maximum POST data.

Below is a description of how to adjust these settings.

1-Maximum Attachment Size

The Maximum Attachment Size is set in the Administrative place on the Lotus Quickr server. To access this setting, do the following:

a. Login as Administrator from the admin.nsf (http://servername/Lotusquickr/Lotusquickr/admin.nsf.).
b. Select: Server Settings --> Other Options --> Edit Options (button). You should see the following screen:


Lotus. Quickr
Places
Files
Places
Public Places
Instructions
Security
User Directory
Other Options
Other Options
You can choose several server-wide preferences here. Note: users must refresh their br
Enable/Disable ActiveX and Java. Check to allow the use of ActiveX controls and/or
disable some advanced authoring and customization features.)
Enable ActiveX
Enable Java Applets
Enable/Disable Form PlaceBots. Check to allow place managers to import and run F
Enable Form PlaceBots
Maximum Attachment Size. Enter the maximum file size allowed for any attachment
File size in KB:
50000

c. Locate the Maximum Attachment Size field. The default value is 50,000 kilobytes (about 50 megabytes).
d. Increase the size of the Maximum Attachment Size, up to a maximum of 1 GB (1,048,576 KB). To allow an unlimited size, clear the value in this field (make the field blank).

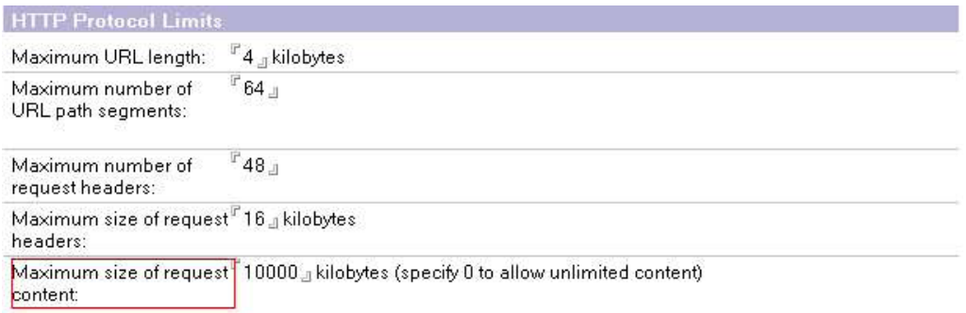
2. Maximum size of request content

The "Maximum size of request content" is set in the Server document for the Lotus Quickr server. To access this setting, do the following:

a. From the Domino Administrato, Open the Server document.
b. Go to the Internet Protocols tab then select the HTTP sub-tab.

Basics | Security | Ports... | Server Tasks... | Internet Protocols... | MTAs... | Miscellaneous | Transactional Logging | Shared Mail | Lotus Traveler | Administration
HTTP | Domino Web Engine | DIIOP | LDAP
Basics
Mapping

c. Page down to the bottom of the document to locate the HTTP Protocol Limits section on the right.
d. Locate the "Maximum size of request content" field. The default value is 10,000 kilobytes (about 10 megabytes).

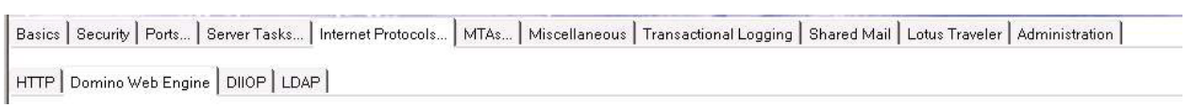

HTTP Protocol Limits
Maximum URL length: 4 kilobytes
Maximum number of URL path segments: 64
Maximum number of request headers: 48
Maximum size of request headers: 16 kilobytes
Maximum size of request content: 10000 kilobytes (specify 0 to allow unlimited content)

e. Increase the size of the "Maximum size of request content", up to a maximum of 1 GB (1,048,576 KB). Set it to zero (0) to allow unlimited size content.

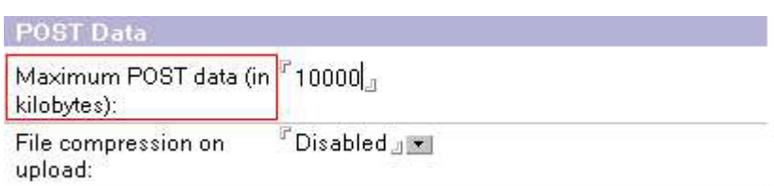
3. Maximum POST data

The "Maximum POST data" is set in the Server document for the Lotus Quickr server. To access this setting, do the following:

a. Open the Server document.
b. Go to the Internet Protocols tab then select the Domino Web Engine sub-tab.


Basics | Security | Ports... | Server Tasks... | Internet Protocols... | MTAs... | Miscellaneous | Transactional Logging | Shared Mail | Lotus Traveler | Administration
HTTP | Domino Web Engine | DIIOP | LDAP

c. Locate the "Maximum POST Data" field. The default value is10,000 kilobytes (about 10 megabytes).



d. Increase the size of the "Maximum POST data", up to a maximum of 1 GB. For use with Lotus Quickr, you must set a specific value. You should not use zero to indicate unlimited.

After making these changes, restart the HTTP task on the server for the new settings to take effect.

If you see out of memory errors with large file uploads, you might need to enable some notes.ini file parameters. Refer to the tech note “Uploading large files when using

Lotus Quickr" (#1304758) for more details. (tp://www-01.ibm.com/support/docview.wss?uid=swg21304758).

Enable Demo Mode to work with sample projects

If you need to work with sample projects for training or demonstration purpose, you may need to activate the Demo Mode. By doing that, a button "Change All Dates" will be available on the Site Settings / Projects page.

Clicking on this button will modify all dates for the selected project: Not only the whole schedule will be moved according to the new start date, but all project data will also be modified accordingly (issue, change requests, feedbacks, etc.)

This feature is obviously reserved for sample projects.

If you may need this feature, you have to enable the Demo Mode in a server configuration file.

The server configuration file is located in the deployed application, in the WEB-INF directory: **projexec_config.properties**
The property that needs to be specified is **projexec.demomode**.
Example:

```
# This option allows you to see the Change Dates button in
order to move the dates to fix demo data
# The default value is false
projexec.demomode=true
```

The server must be restarted after a property change.

Indicate your SSO configuration to ProjExec

In order to make the SSO function properly in ProjExec, ProjExec needs to know the exact SSO domain as it is defined in the server SSO configuration. Otherwise, users may encounter problems to log in to ProjExec after a session timeout.

By default, ProjExec considers that the SSO domain is the fully qualified domain name.
If it is not the case, you must change the domain name in a server configuration file located in the deployed application, in the WEB-INF directory: **servlet_config.properties.**

```
# SSO Token domain name
# This property allows to indicate the value of the SSO domain
as it is defined in the server SSO configuration.
# Available values are one of the 2 predefined keywords
"FullyQualifiedHostName" or "FullyQualifiedDomainName" or
directly the real domain name (ex: mycompany.com).
```

```
# If server name is server.subdomain.domain.com,
FullyQualifiedHostName means "server.subdomain.domain.com" while
FullyQualifiedDomainName means "subdomain.domain.com".
# The default value is: FullyQualifiedDomainName
sso.token.domain=FullyQualifiedDomainName
```

The server must be restarted after a property change.

Issue while accessing Quickr documents in case of accents in file name

If you are using Quickr 8.5, and if you are using documents with accents in the file name (ex: "Spécifications.doc"), you may have the following issue: the document can be opened normally from the Document Library, but if it has been added as a bookmark in ProjExec, clicking on the bookmark does not work on ProjExec pages: we will get an error and the document will not open.

This issue is due to a wrong URL returned by Quickr. This issue is known and has been fixed in Quickr 8.5.1.

Database connection error while using DB2 and Quickr J2EE on Linux

You have installed and used ProjExec successfully but after an application server restart, ProjExec pages are no longer accessible and the following exception is dumped in SystemOut.log file

java.lang.UnsupportedClassVersionError: (com/ibm/db2/jcc/DB2Driver) bad major version at offset=6

If you are using db2jcc libraries and if you selected all jar files starting with 'db2jcc' during ProjExec installation process (Database configuration Step), you should try the following:

- go to ProjExec deployed application in Quickr/wp_profile/installedApps/xxxnode/PA_ProjExec.ear/projexec.war/WEB-INF/lib
- remove db2jcc4.jar to force the application to use only the DB2 driver included in db2jcc.jar
- restart the application

Error while displaying Resource Allocation and Light Gantt charts

If you are not able to see the "Resource Allocation" chart or the "Light Gantt" chart, please modify the server configuration to allow usage of AWT headless (graphical library).

- On WebSphere Portal server: Log in to the Websphere administrative console and from the left menu select Servers -> Application Servers -> Websphere Portal -> Java and Process Management -> Process Definition -> Java Virtual Machine for Websphere Portal 6.+ platforms.
  In the Generic JVM arguments text field add the following value:
  -Djava.awt.headless=true
  Save the configuration and restart Portal.

- On Domino server: Configure the Domino Java Virtual Machine in order to allow AWT headless usage.

  Look for JavaUserOptionsFile property in your notes.ini file.
  If this property is defined then you will have to edit the file that is specified by this property.
  Otherwise, create a new text property file on the server and indicate this file as the JavaUserOptionsFile by setting JavaUserOptionsFile=path in your notes.ini.
  Then you must set the java.awt.headless property to true in the JavaUserOptionsFile.
  Example:
  In notes.ini
  JavaUserOptionsFile=/home/trilog/jvmOption.properties
  In /home/trilog/jvmOption.properties add the following property to the file.
  java.awt.headless=true
  Save the files and restart the domino server.

Sametime and Presence awareness Issues

- For IBM Lotus Sametime Instant Messaging® integration to function properly, Sametime® should be configured to use the default port (i.e. port 80). Tunneling should be configured on port 80.

- For Sametime Instant Messaging® integration, Sametime® requires the page to be refreshed for the presence awareness to get activated.

- Presence Awareness does not function on Microsoft Internet Explorer® 7 when using Sametime® 7.5 and Websphere Portal® 6.0.0. IBM provides a patch that you should install.

- To use Sametime Instant Messaging® from Firefox®, you have to modify some particular options in Sametime® configuration. Please refer to IBM Sametime® documentation.

Miscellaneous

- On the Server editions of the Windows® operating system, you may encounter some problems when viewing ProjExec using Internet Explorer®. This is due to the fact that the default security settings on the Windows Server machines don't allow client-side JavaScript execution. The following error message will be displayed:

  "An error has occurred while processing the servlet named: SimpleFileServlet"

  To solve this issue you should add the ProjExec application URL to the list of trusted sites in the Security tab of the Internet Options menu.

- With DB2 database, the following error might be reported in the system log:

  Database error: SQL State '54028';
  Native Error Code '-429';
  Error Text '[IBM][CLI Driver][DB2/LINUX] SQL0429N The maximum number of concurrent LOB locators has been exceeded. SQLSTATE=54028 '.

  This error is caused by a limit to the number of LOB handles in DB2. To overcome this problem, you require a patch in DB2; you need to edit file db2cli.ini located in the root directory of DB2 installation.
  Add the following lines to the file:

  [{Database name}]
  PATCH2=50
  LobCacheSize=1048576

  The PATCH line instructs DB2 to free up LOB locators after it has used them, and the LobCacheSize parameter adjusts the total memory that is available to LOB locators; in this case 1 GB. You might then need to restart the DB2 instance.

- The **"load qptool upgrade -f -a"** command which IBM recommends running after applying any Quickr Domino FP installation, may corrupt ProjExec Places and Templates by adding Quickr's standard Home Page in the TOC.

  To fix this issue:

  1- Download the zip file **pe_tools.zip** from the following link:
  http://www.triloggroup.com/portal/projexec/download/pe_tools.zip

2- Unzip the downloaded file under <directory where Domino is installed>\Domino\Data\ProjExec.
3- Sign the agent by a Quickr Admin User who has full rights to all Quickr templates and places.
4- Run the agent. You can run it in two ways:

    a- From the server console, issue the following command:
    tell amgr run "ProjExec\pe_tools.nsf" 'pe_fixup'

    b- From the Notes client, open the ProjExec Tools database then from the Actions Menu run the Agent called **Fixup ProjExec Places** (slower than previous).

This will automatically repair all ProjExec Templates and Places by restoring the original ProjExec TOC.